4. Create Initial Client Survey



United States Department of Energy

Weatherization Assistance Program

Weatherization Assistant

Version 8.2.4.2 12/29/2004



National Energy Audit Tool (NEAT)

Developed by Oak Ridge National Laborator,



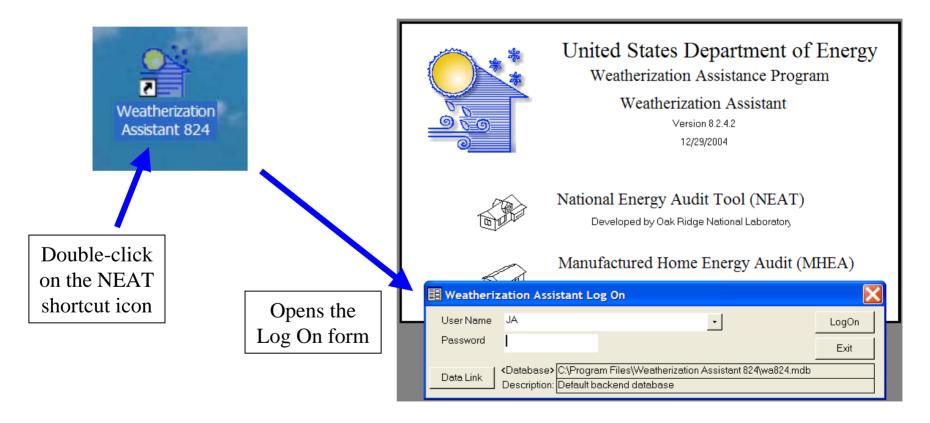
Manufactured Home Energy Audit (MHEA)

Developed by the National Renewable Energy Laboratory

After the current version (version 8.2.4.2 in this example) of NEAT has been installed, there are several steps that need to be performed to make NEAT ready for use by your agency. In general, these steps only need to be performed one time. There are additional steps that will be covered in another document.

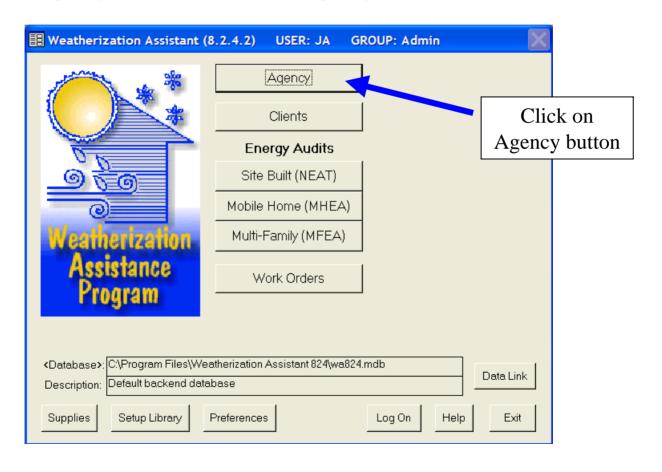
- <u>1. Create your Agency</u> Create your agency record by copying the default agency record and renaming it to your agency. Fill in agency details, such as address, phone numbers, etc.
- <u>2. Create Supply Library</u> Create your agency's supply library by copying the default supply library and renaming it to identify it as belonging to your agency.
- 3. Create Setup Library Create your agency's setup library of weatherization measures by copying the default setup library and renaming it to identify it as belonging to your agency.
- 4. <u>Create Initial Client Survey</u> Create your agency's Initial Client Survey by copying the default Initial Client Survey and associating it with your agency.

Login to NEAT using the default login name and password, so that you can access the various features. Eventually you may set up user login names and passwords for personnel at your agency. When NEAT is first installed the default login user is "Jane Admin", having a short user name of "JA", and a password of "admin". The password is case-sensitive.



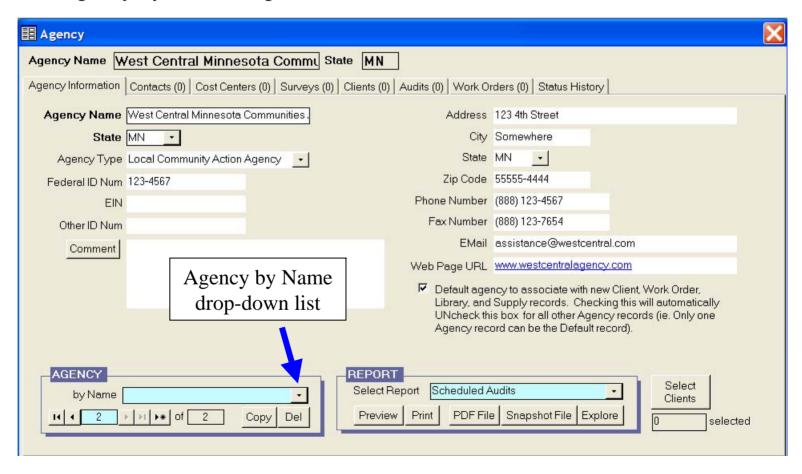
4. Create Initial Client Survey

Create an Initial Client Survey for your agency by copying the default survey to your agency record. From the main screen click on the Agency button to show the Agency screen.



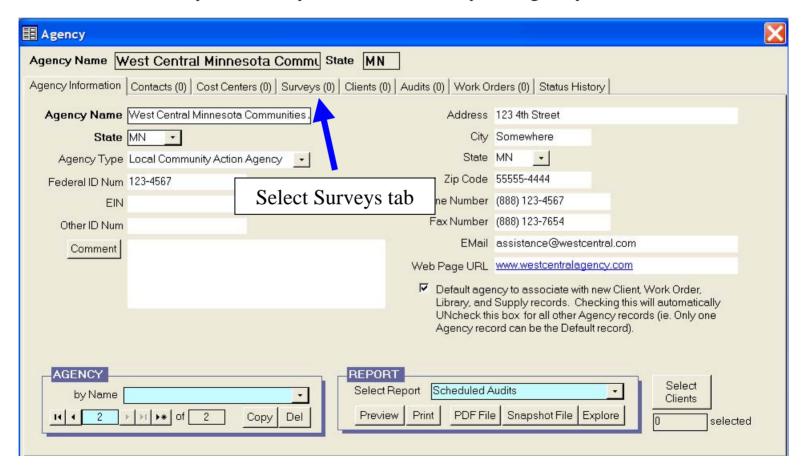
4. Create Initial Client Survey

Your agency should be shown by default when the Agency screen opens. If it isn't shown, select your agency record by using the find Agency by Name drop-down list in the lower left corner of the screen.



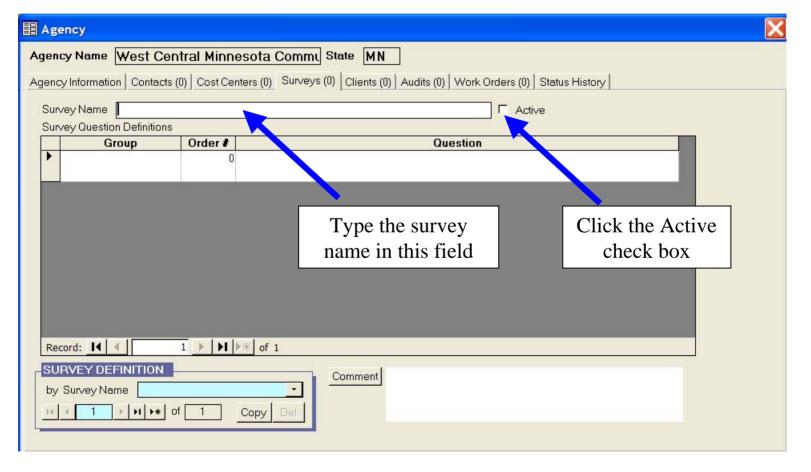
4. Create Initial Client Survey

Once your agency is shown on the Agency screen select the Surveys tab. The tab should be labeled as "Surveys (0)", indicating that there are zero surveys currently associated with your agency.



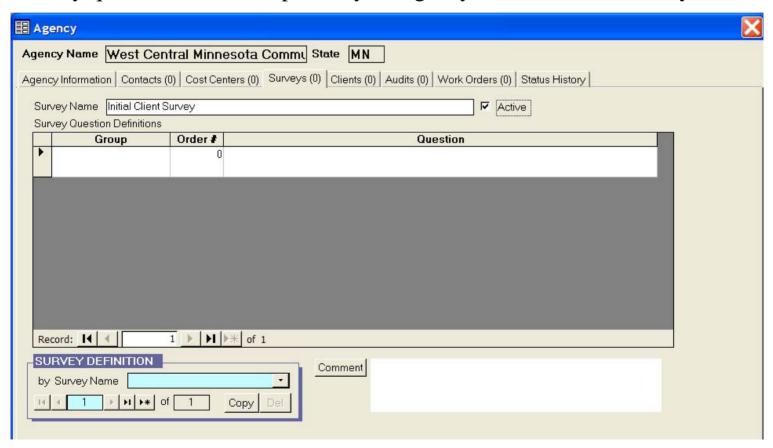
4. Create Initial Client Survey

After selecting the Surveys tab, the screen should appear as shown below. Create the first survey record for your agency by typing the text "Initial Client Survey" in the Survey Name field. Make the survey active by clicking in the "Active" check box.



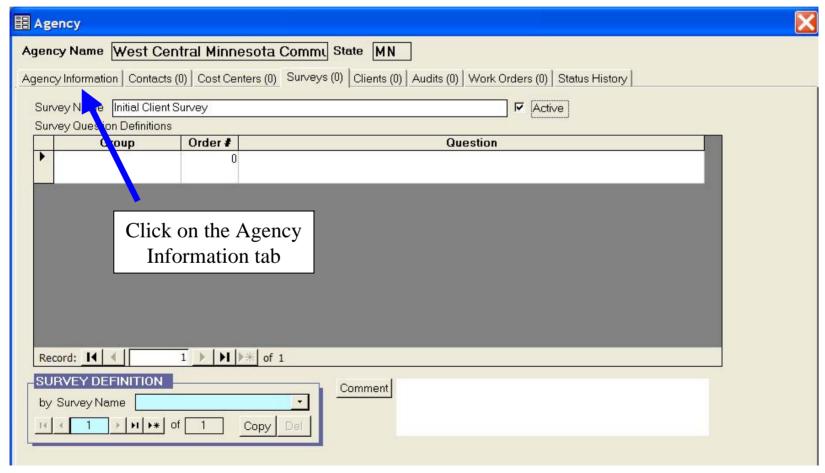
4. Create Initial Client Survey

The Survey screen should appear as below. Any survey can be built from scratch by entering questions directly into this form. However, for the Initial Client Survey, the survey questions have already been entered and stored with the original default "State of Minnesota" agency record. Those survey questions will be copied to your agency's Initial Client Survey.



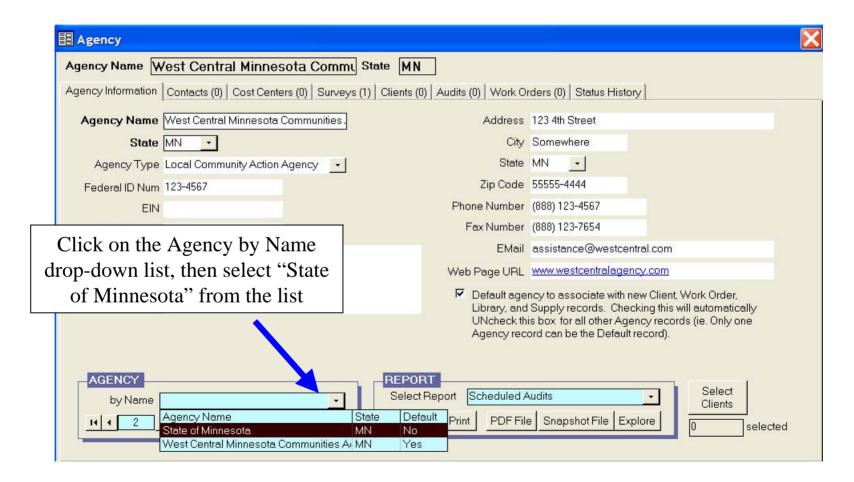
4. Create Initial Client Survey

Select the Agency Information tab in order to navigate to the original "State of Minnesota" agency record, from where the Initial Client Survey questions will be copied.



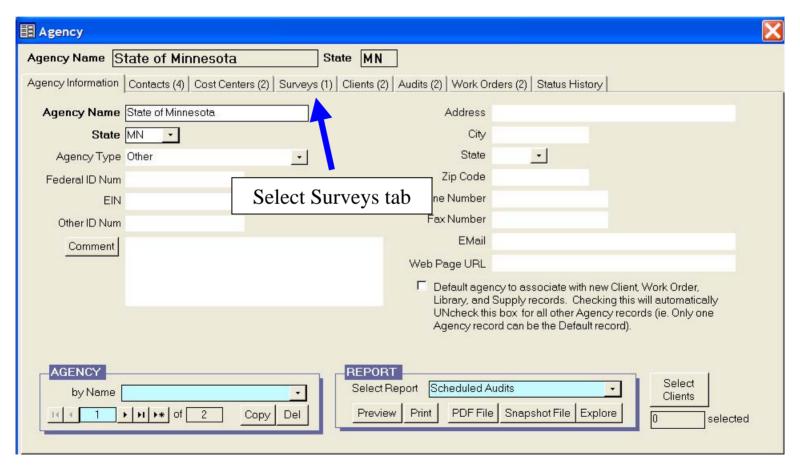
4. Create Initial Client Survey

The Agency Information tab shows your agency as the default agency. Select "State of Minnesota" from the Agency by Name drop-down list.



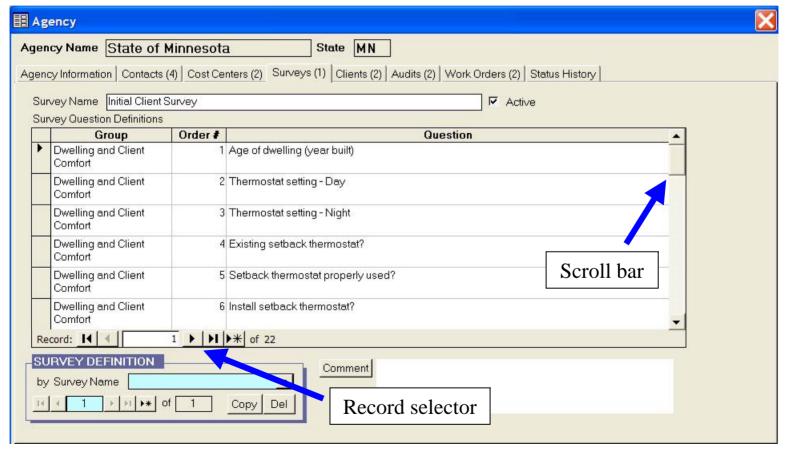
4. Create Initial Client Survey

Once the "State of Minnesota" agency is shown on the Agency screen select the Surveys tab. The tab should be labeled as "Surveys (1)", indicating that there is one survey currently associated with that agency.



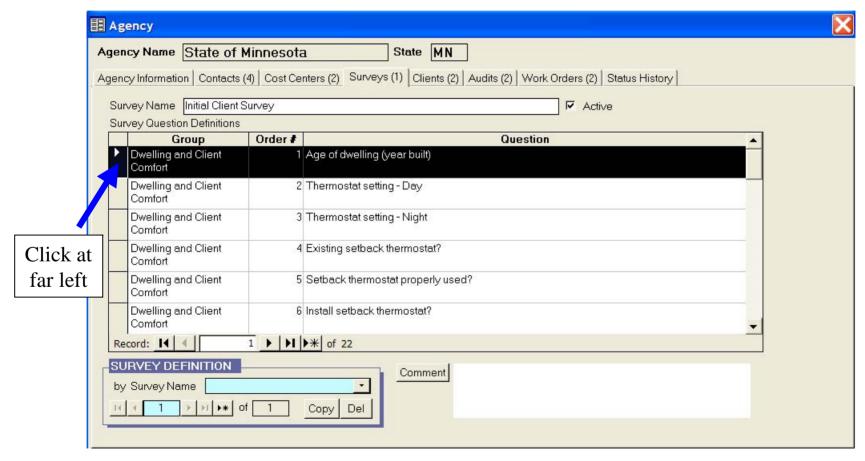
4. Create Initial Client Survey

The Initial Client Survey is shown for the agency named "State of Minnesota". The first 6 questions out of the full set of 22 questions can be seen on the screen. The other questions can be viewed by using the record selector or using the scroll bar along the right side.



4. Create Initial Client Survey

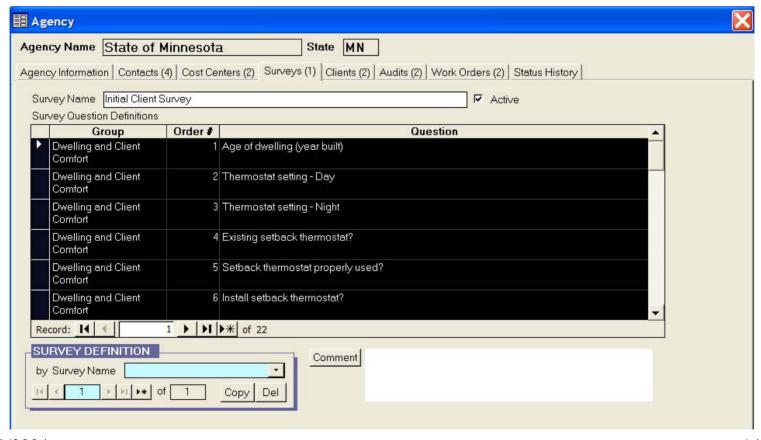
The questions from the Initial Client Survey will be copied in three steps. The first step is to highlight one of the questions by clicking the square to the far left of the question. The screen should look identical to that below.



4. Create Initial Client Survey

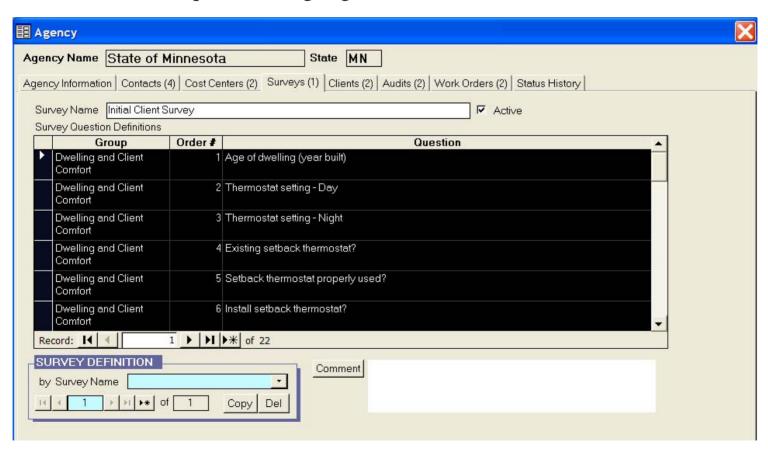
The second step is to highlight all of the questions by pressing the "Ctrl" key, and while holding that key down, also press the "A" key.

Alternatively, you can hold the left mouse button down in the square to the left of the first question, and drag the mouse down to highlight all of the questions. The screen should look identical to that below.



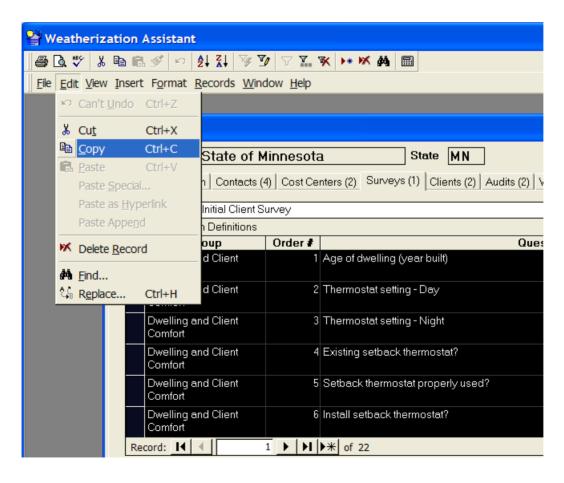
4. Create Initial Client Survey

The third step is to copy all of the highlighted questions by pressing the "Ctrl" key, and while holding that key down, also press the "C" key. The shortcut reference to this key sequence is Ctrl+C. The screen will continue to show all of the questions highlighted as shown below.



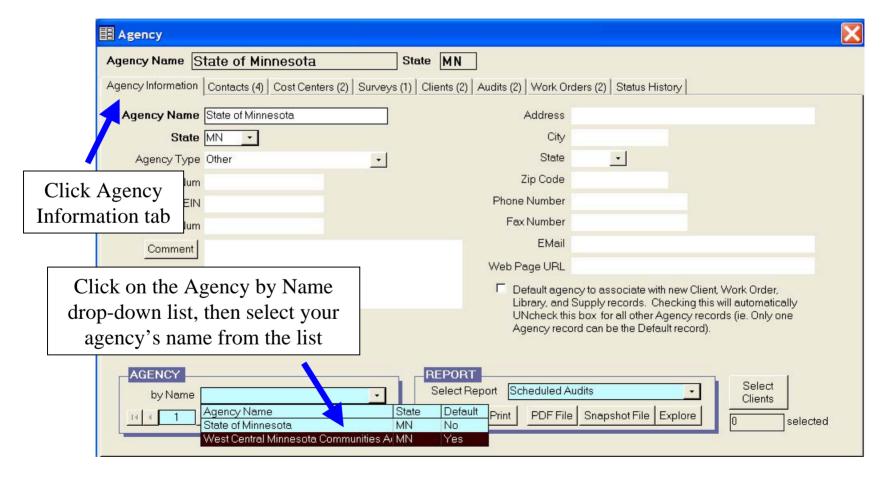
4. Create Initial Client Survey

Alternatively, after all of the questions are highlighted, they can all be copied by selecting the Edit menu near the top of the screen, then selecting Copy from the drop-down list. Ctrl+C is the shortcut command for Copy.



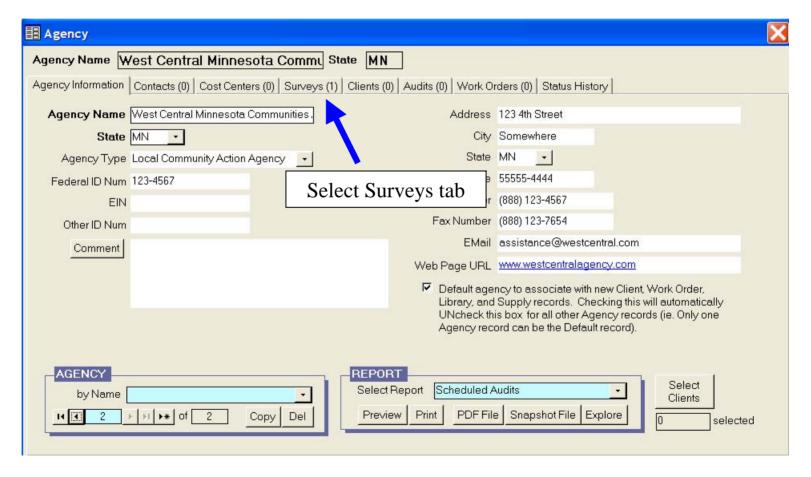
4. Create Initial Client Survey

To paste the survey questions to your agency's Initial Client Survey, select the Agency Information tab and choose your agency from the find Agency by Name drop-down list, as shown below.



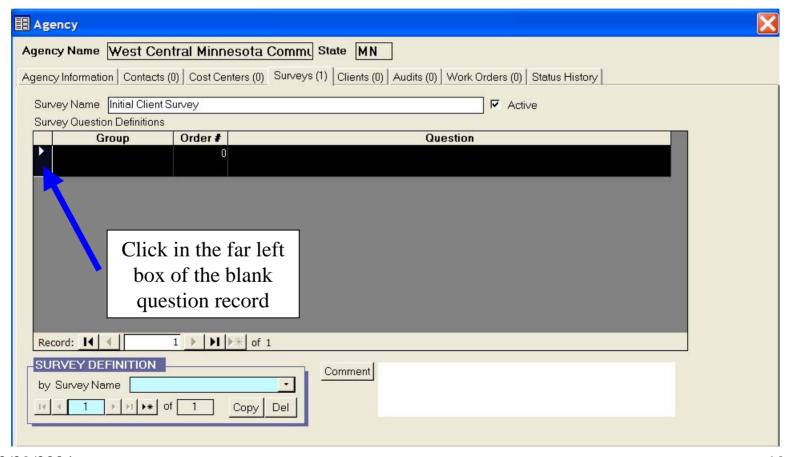
4. Create Initial Client Survey

Your agency's record will be shown on the Agency screen. From this screen select the Surveys tab to show the empty Initial Client Survey for your agency that was created in a previous step.



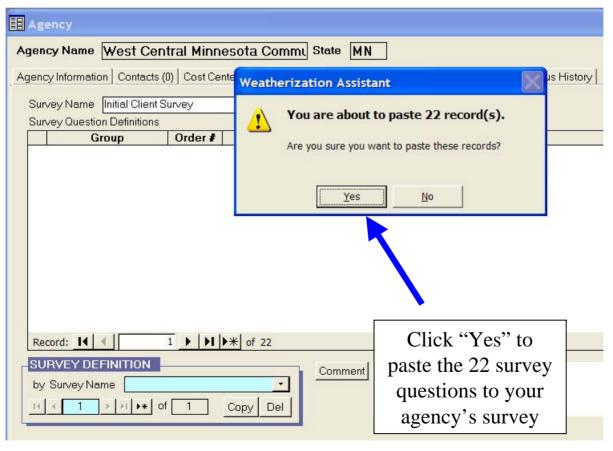
4. Create Initial Client Survey

The Survey tab is labeled "Surveys (1)", indicating that one survey record was previously created for your agency, but the survey is currently empty, since no questions have been assigned to it. Highlight the entire first question record, by clicking in the far left box of the blank question record.



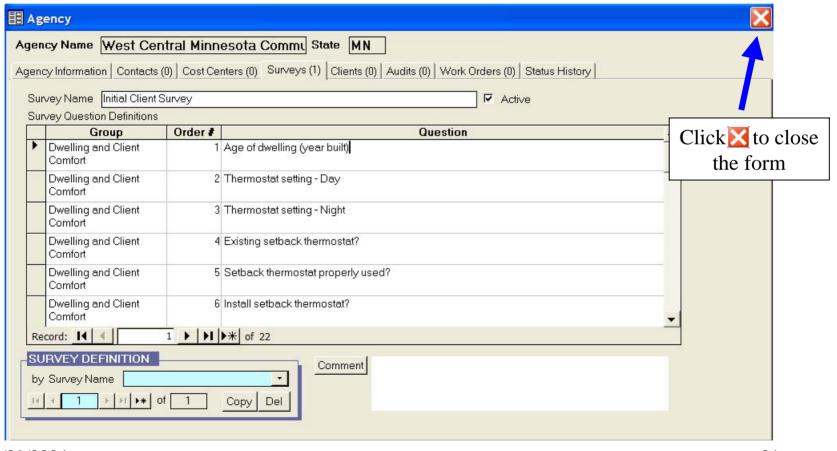
4. Create Initial Client Survey

Paste all of the copied questions into your agency's Initial Client Survey by pressing the "Ctrl" key, and while holding that key down, also press the "V" key. The shortcut reference to this key sequence is Ctrl+V. A warning screen will be shown indicating that you will be pasting 22 records.



4. Create Initial Client Survey

All of the survey questions should now be pasted into the Initial Client Survey for your agency. This survey can now be referenced by any Client record that is created for your agency. Contact, Cost Center, Client, and Audit records will be created by downloading information from eHEAT. Close the form to return to the main NEAT screen.



Return to Main Screen

